EMAIL & E-COMMUNICATIONS RECORDS MANAGEMENT

SESSION 7 OF 7 ON RECORDS MANAGEMENT

SESSION GUIDELINES AND GENERAL INFORMATION

SESSION 7 OF 7 ON RECORDS MANAGEMENT

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GENERAL GUIDANCE FOR ON-LINE SESSIONS

1. Please remember that while you are in the on-line classroom, all other participants **can hear everything** you say (even in the background), and **can see everything** you write on the whiteboard.

2. I will be muting All participants to help with sound distortion.

3. Please make sure that all phones are muted during the sessions. **Press *6 and your phone will be muted**.

4. Feel free to submit notes during session for discussion. If you would like to **send a note / comment,** please **send to "all"** so that everyone can see the question and then hear the answer to that question.

5. Please raise your hand if you wish to speak

6. Take a vote: How many of you are participating in today's session with a group of co-workers?

7. If so, how many of you are there in your group? (Send # as a note)

8. At the end of the training, **I will be taking questions**. Write down any questions you have during the session, and **we will have an opportunity to ask them at the end**.

ALL RECORDS MANAGEMENT IN ARIZONA IS GOVERNED BY ARIZONA REVISED STATUTES (ARS)

- In Arizona, **everything that we do** in Records Management is governed by Arizona Revised Statutes (ARS).

- The ARS that govern Records Management are:

  § 41-151.14 – §41-151.19

  and

  Portions of **§39-101 – §39-128**

- The purpose of this training today is to discuss the management of electronic records.

WHAT IS A “RECORD”

41-151.18. Definition of records

In this article, unless the context otherwise requires:

- **"records"** means all books, papers, maps, photographs or other documentary materials,
- **Regardless of physical form or characteristics**, including prints or copies of such items produced or reproduced on film or electronic media pursuant to section 41-151.16,
- **Made or received by any governmental agency** in pursuance of law or in connection with the transaction of public business and preserved or appropriate for preservation by the agency or its legitimate successor
- **As evidence of the organization, functions, policies, decisions, procedures, operations or other activities of the government, or because of the informational and historical value of data contained in the record**, and includes records that are made confidential by statute.

WHAT IS NOT A RECORD

41-151.18. Definition of records - continued

Not included within the definition of records as used in this article:

- **Library or museum material** made or acquired solely for **reference or exhibition purposes**,
- **extra copies of documents preserved only for convenience of reference**
- **and stocks of publications or documents intended for sale or distribution to interested persons**

EMAIL RECORDS
GENERAL INTRODUCTION / GENERAL INFORMATION

SESSION 7 OF 7 ON RECORDS MANAGEMENT

DUTIES OF ALL PUBLIC BODIES AND EMPLOYEES FOR RETENTION & PRESERVATION

Establish and maintain an active, continuing program for the economical and efficient management of the public records of the agency.

ARS 41-151.14(A)(1)

DEFINITION: ELECTRONIC COMMUNICATIONS

E-mail and Electronic Communication Records*

- (including electronic mail messages (E-mail), instant messages (1M), text messages, mobile to mobile (M2M) messages, voice-over Internet Protocol (VoIP) messages and other related records)

- **IT Challenge**: Not all of these forms of communications can be easily tracked by IT, and some may not even pass through IT-controlled channels. Ex: mobile to mobile messages are on networks not managed by IT

- **RM Challenge**: If some of these communications are not controlled by IT, then the challenges of capturing the communications and managing them throughout their retention life cycle will be difficult.
- The **USER** becomes **the one that MUST capture and manage** these communications if they fit the definition of a “record”.
- AND, the **USER** must be made aware of this **(their) responsibility**!

MAIN POINTS TO E-MAIL AS A RECORD

- E-mail requires all Government employees to be Records Managers
- E-mail records retention is based upon the content and intent of e-mail
- E-mail is a format of communication and not a record series of its own
- There can be no single retention period for e-mail records since retention is based upon content
- When sending / receiving e-mails:
  - Is this a record?
  - What type of record is this?
  - What is the retention for this record?

TIPS FOR THWARTING VIRUSES:

- Don’t open an e-mail attachment from someone you don’t know.
- If you are unsure of an attachment, call your Systems staff – they can try to determine if it’s legitimate.
- Banks, credit card companies, and financial businesses will NEVER ask for personal information in an e-mail. Don’t be fooled by official-looking e-mail.
- Don’t be fooled by official-looking messages which threaten to suspend your account(s).
- Don’t click on that ‘unsubscribe’ link in a spam e-mail message – it only tells the spammer you’re still there.

Content and Intent

E-mail *is managed by its* ***content and intent****,*
NOT its format.

EMAIL CONTENT V. EMAIL AS A FORMAT

	Vote	**Vote**
• The retention period for email is 45 days.	True	False
• There can never be ONE single retention period for email.	True	False
• All email can be classified as “General Correspondence”.	True	False
• An email from an employee asking for vacation leave is the same retention as a *Policy and Procedure Record*.	True	False
• An email from a contracted vendor regarding a specific contract is the same retention as a “*Contract Record*”.	True	False
• An email between two employees discussing the FY14 Budget is the same as a “Budget Record”.	True	False

KEEP OR DELETE?

- Subject: Can you meet me for lunch?
- Subject: Memo re new travel policy
- Subject: Committee meeting minutes
- Subject: New policy on vacation leave
- Subject: Listserv messages 7/10/05
- Subject: Instructions for filling out travel form
- Subject: Pick up some bread for supper?
- Subject: Sorry I missed class this week
- Subject: Negotiations with a records storage company

WHAT TO DO WITH ATTACHMENTS?

If e-mail and the attachment are a record:

- Save the e-mail and attachment together in original format within your e-mail software on the e-mail server
- Save the email and its attachment in another location (hard drive or network space)
- Print the e-mail and attachment and save them in paper format

***MUST Keep Email and Attachment Together for chain of custody purposes.

WHERE SHOULD YOU STORE E-MAIL?

What does your IT Policy say?
Does the length of the retention period?

E-mail Inbox / Software

- Advantages – accessed from multiple locations through webmail, more secure, backed up regularly.
- Disadvantages – may run out of allotted space

Personal / Shared Hard Drives (.pst)

- Advantages – avoid filling up allotted server space.
- Disadvantages – may not be backed up regularly, not available through webmail

DVD's / CD's

- Advantages – good for inactive or infrequently accessed messages. Short term retention.
- Disadvantages – messages more difficult to locate, difficult to remember for public records request purposes, media may degrade or become obsolete)

A WORD ABOUT FORMATS

Retention Period:

- If you have a long retention period, is that email safe in your inbox from early or mistaken deletion? Can you really keep a three-year email safe? 5-years? 10-years?

Print:

- Print out important e-mails and keep along with other records in a specific records series.

Electronic:

- If saved in native file formats, accessible only as long as e-mail application supported. If saved in open format, such as ASCII text, better chance for access / preservation in future, but lose original formatting.

A WORD ABOUT PRINTING

Print version must include ALL Metadata:

- Addresses – not names of distribution lists – of specific recipients (the “To:”)
- Including addresses in “cc:” and “bcc:” fields
- Addresses of the sender (the “From:”)
- The subject line
- The body of the e-mail message
- All attachments
- The date and time the message was sent and/or received

3 WAYS YOU COULD ORGANIZE YOUR E-MAIL

1. **No filing strategy:**
   Creating no folders, keeping all e-mails in inbox

- **Advantages:**
  - Requires little effort,
  - e-mail owner can locate certain messages by using search engine or remembering when specific e-mail received.
  - Threading feature can also be used, if available.

- **Disadvantages:**
  - Over time, more difficult to recall when certain e-mails received,
  - more difficult to retrieve w/out subject folders.
  - May be difficult for your successor, colleagues, or an archivist to make sense of e-mails in the future.
  - May keep more e-mails than you need to.

ORGANIZING E-MAIL (#2.)

2. **Filing system: Simple filing scheme based on topical areas. Can incorporate your office's records retention and disposition schedule.**

- **Advantages:**
  - Provides complete view of all e-mails on a particular topic,
  - provides context for a set of messages,
  - allows for quick retrieval,
  - allows others to make sense of your e-mails, reduces clutter in inbox
- **Disadvantages:**
  - Takes time and discipline to maintain

ORGANIZING E-MAIL (#3.)

3. Combination of filing system and usage of inbox

- E-mails left in your inbox should be e-mails you need to act upon or on which you need resolution
- Delete e-mails you don’t need to keep on a daily basis
- File e-mails you know you want to keep but don’t have to follow up on

SUB-FOLDERS AND HOW TO CREATE THEM

Do you know how to set up subfolders for your inbox? If not, ask a colleague or ask IT to help with this

Here a How-to from help.outlook.com:

- if you want to store mail in a place other than the inbox with Outlook, it takes a folder or two
- Adding folders, fortunately, is easy;
- you can name them as you like, of course,
- and organize the Outlook folders themselves in hierarchies using sub-folders.

Create and Manage Folders

- By default, messages that are sent to you are stored in your Inbox.
- But you can organize your messages into a hierarchical folder system and continue to adjust it as your needs change.

- How do I create a new mail folder?
- In the Navigation Pane, click **Mail** to view the list of all folders in your Inbox.

- Right-click the folder in which you want to create a new subfolder. For example, to create a subfolder in your Inbox, right-click **Inbox**. To create a new folder at the same level as your Inbox, right-click your name at the top of the folder list.

- Click **Create New Folder**.

- Type a name for your new folder.

- Press ENTER to save your changes.

VIDEO ON HOW TO CREATE SUBFOLDERS

- For those of you that like “how-to” videos, here is one for creating subfolders in Outlook:
- http://www.youtube.com/watch?v=9IAjU34ebng

***Disclaimer: I am not recommending this video creator, nor their videos, etc. At 29 seconds, this video is short, sweet and to the point.

SUGGESTED SUBFOLDERS

- Here are some subfolders you might want to create:
- 1. General Correspondence
- 2. Time and Leave Records
- 3. Progress Reports (Weekly / Monthly)
- 4. Budget Work files (FY13) (FY14) (FY15)
- 5. Current Contracts
- 6. Expired Contracts
- 7. Case-related

- Use the General or Custom Retention Schedule for your Division or the record series you create / receive and set up subfolders for each records series you work with.

- Set up subfolders that reflect the types of records you deal with.

E-MAIL FOLDER STRUCTURES

- **Records series** – Example: Annual Reports
- **Geographic area or location** – Example: Travel Reports – England
- **Numbers or symbols** – Example: NSF-001; Case #
- **Dates** – Example: March 2004
- **Subjects** – Example: Budgets, Departments/Offices
- **Sender** – Example: John Smith; State Library and Archives

TOP 10 TIPS FOR E-MAIL USE

10. Be careful when opening e-mail from an unknown sender. The message could be spam or could contain a virus.

9. Use subject lines that are indicative of the content of your message and that the person who receives the e-mail can use to retrieve it.

8. Use work e-mail systems sparingly to send or receive personal e-mail. Use discretion when mixing personal and work-related messages.

TOP 10 TIPS (CONT.)

7. Take time to compose a thoughtful response before sending an e-mail. Proofread your e-mail for spelling errors, grammar, and punctuation before sending it.

6. When sensitive issues need to be discussed, face-to-face conversation or a telephone call may be a better communication choice than e-mail. Remember that the security of your e-mail cannot be ensured.

5. Do not put anything in an e-mail message that you would not want to see printed in tomorrow's newspaper or displayed on a bulletin board.

TOP 10 TIPS (CONT.)

4. Manage e-mail based on its content, not space quotas. Retain and dispose of e-mail messages according to established records retention schedules.

3. Everyone receives e-mail that may pose personal or institutional risks. These e-mails should be removed from the e-mail system as soon as possible and according to law.

2. For most people, much of the e-mail that they receive is not too important, but everyone receives a small percentage that is. You should take special care with these important e-mails to make sure that they are secure, retrievable, and preserved over time.

TOP 10 TIPS (CONT.)

1. E-mail does not manage itself.

- Be a proactive manager of your inbox
- Manage your messages in a way that is most effective for you
- May involve filing significant messages
- Or, a combination of filing in folders
- and / or using the inbox to store messages.

Important to Remember:

E-mails that mix business and personal messages are considered public records!

EMAIL POLICIES – FROM A RECORDS MANAGEMENT POINT OF VIEW

SESSION 7 OF 7 ON RECORDS MANAGEMENT

PROTECTING YOUR RECORDS

Have a
Records Management focused
Email Policy in Place

E-MAIL / E-COMMUNICATIONS POLICY ESSENTIALS

- **Clearly state what makes an e-mail a record**

    - Content of e-mail
    - Intent of e-mail
    - Meets the definition of a “record”
    - Is discoverable

- **Privacy expectations**

    - Explode the myth of the “private” e-mail
    - E-mails have a life of their own
    - But I used my home computer / PDA!
    - Sensitive, proprietary, confidential

E-MAIL / E-COMMUNICATIONS POLICY ESSENTIALS

- **Identify and classify**
  - Going beyond, “Is this a record?”
  - business: sensitive / restricted / closed,
  - informational, personal, junk
- **Retention for dummies**
  - What to keep and why
  - How long = content and purpose
  - Who keeps it: sender, recipient, all?
  - Subject line matters

E-MAIL / E-COMMUNICATIONS POLICY ESSENTIALS

- **Leave no piece behind:**
  - Body, attachments, metadata, distribution lists

- **Which formats do you like:**
  - Preserve metadata
  - efficient and timely retrieval
  - lifelong usability
  - ensures access

- **Quotas and restrictions**
  - E-mail message and mailbox size limitations

E-MAIL / E-COMMUNICATIONS POLICY ESSENTIALS - DISASTER RECOVERY PLAN

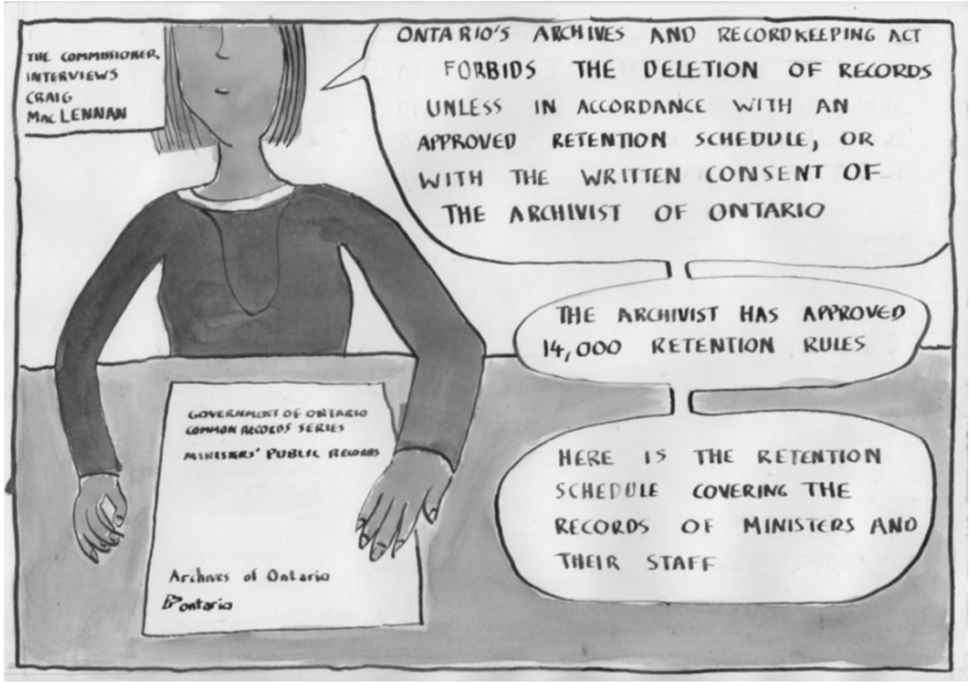
Don’t forget to include email / e-communications as part of your office Disaster Recovery plan:

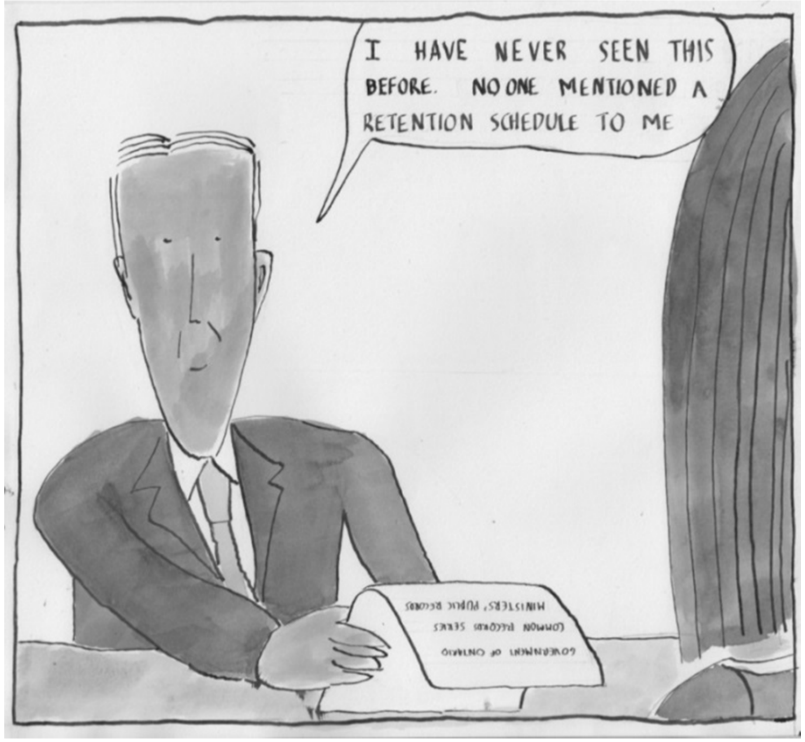
- Names and phone numbers of contacts
- Names and phone numbers of data recovery vendors
- A back-up copy of computer files
- Plan to recover paper records too
- Try your plan out and see if it works

EMAIL RECORDS SERIES / EMAIL RETENTION PERIOD

SESSION 7 OF 7 ON RECORDS MANAGEMENT

TORONTO EMAIL SCANDAL IN COMICS


THE COMMISSIONER, INTERVIEWS CRAIG MacLENNAN
ONTARIO'S ARCHIVES AND RECORDKEEPING ACT FORBIDS THE DELETION OF RECORDS UNLESS IN ACCORDANCE WITH AN APPROVED RETENTION SCHEDULE, OR WITH THE WRITTEN CONSENT OF THE ARCHIVIST OF ONTARIO
THE ARCHIVIST HAS APPROVED 14,000 RETENTION RULES
HERE IS THE RETENTION SCHEDULE COVERING THE RECORDS OF MINISTERS AND THEIR STAFF
GOVERNMENT OF ONTARIO COMMON RECORDS SERIES
MINISTERS' PUBLIC RECORDS
Archives of Ontario
Ontario


I HAVE NEVER SEEN THIS BEFORE. NO ONE MENTIONED A RETENTION SCHEDULE TO ME
GOVERNMENT OF ONTARIO COMMON RECORDS SERIES
MINISTERS' PUBLIC RECORDS

Thinking Records: James Lappin's records management blog. http://thinkingrecords.co.uk/

EMAIL RECORDS GENERAL RETENTION SCHEDULE

Arizona State Library, Archives and Public Records

General Records Retention Schedule for

All Public Bodies

Electronic Communications, Social Networking and Website Records

Schedule Number: 000-12-22

EMAIL RECORDS GENERAL RETENTION SCHEDULE

E-mail and Electronic Communication Records*

- (including electronic mail messages (E-mail), instant messages (1M), text messages, mobile to mobile (M2M) messages, voice-over Internet Protocol (VoIP) messages and other related records)

1. Official Record

- (including any content in the actual message and any attachments or links that meets the ARS §41-151.18 definition of a record and is not a duplicate record, transitory or retained elsewhere)

…**Retain for the same period as required for other formats of the same records series**

EMAIL RECORDS GENERAL RETENTION SCHEDULE

Examples of common items found in e-mail include the following:

a. General Correspondence

- (including public records requests, forms and other letters;

  memos; correspondence not on a Records Retention Schedule; and other related records not related to a specific project or case; and not executive correspondence)

…After administrative or reference value has been served

EMAIL RECORDS GENERAL RETENTION SCHEDULE

Examples of common items found in e-mail include the following:

b. Contracts, Agreements and Leases and related records

- (including Intergovernmental Agreements (IGA), mutual/ cooperative agreements and Memorandums of Understanding (MOU), but does not include construction contracts (see Facilities/Grounds General Retention Schedule)

…6 years After fulfilled, cancelled or revoked

c. Time and Leave Records

- (including compassionate leave, donated leave, military leave and other related records)

…3 years After created or received

EMAIL RECORDS GENERAL RETENTION SCHEDULE

2. Duplicate / Copies of Records

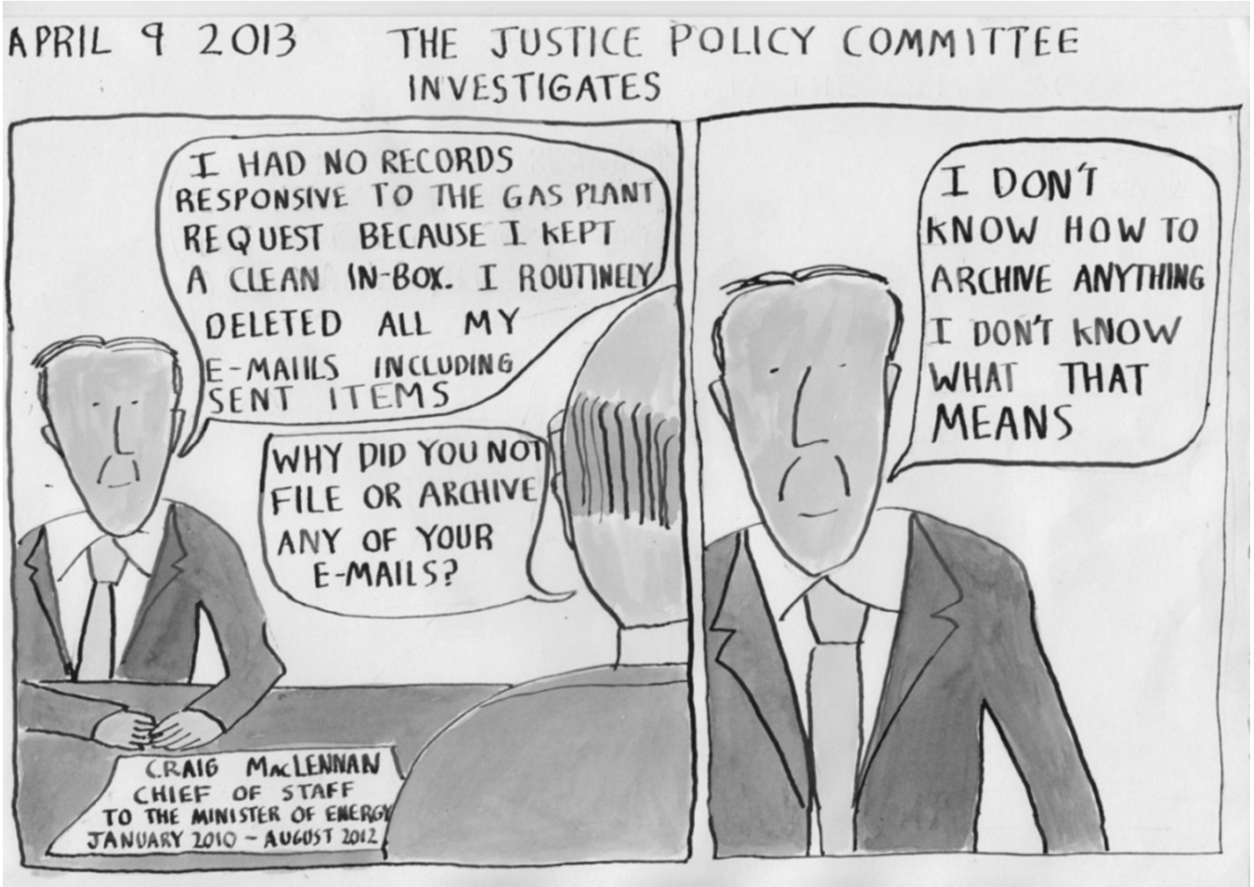
- (non-record office copy, including any content in the actual message and any attachments or links that is substantially a duplicate in nature, with an official copy of the information existing elsewhere)

…After reference value has been served, but not longer than the official record is kept

EMAIL RECORDS MANAGEMENT OPTIONS

SESSION 7 OF 7 ON RECORDS MANAGEMENT

"I DON'T KNOW HOW" = IGNORANCE = NON-COMPLIANCE


APRIL 9 2013 THE JUSTICE POLICY COMMITTEE INVESTIGATES
I HAD NO RECORDS RESPONSIVE TO THE GAS PLANT REQUEST BECAUSE I KEPT A CLEAN IN-BOX. I ROUTINELY DELETED ALL MY E-MAILS INCLUDING SENT ITEMS
WHY DID YOU NOT FILE OR ARCHIVE ANY OF YOUR E-MAILS?
CRAIG MACLENNAN CHIEF OF STAFF TO THE MINISTER OF ENERGY JANUARY 2010 – AUGUST 2012
I DON'T KNOW HOW TO ARCHIVE ANYTHING I DON'T KNOW WHAT THAT MEANS

Thinking Records: James Lappin's records management blog. http://thinkingrecords.co.uk/

USE WHAT YOU GOT

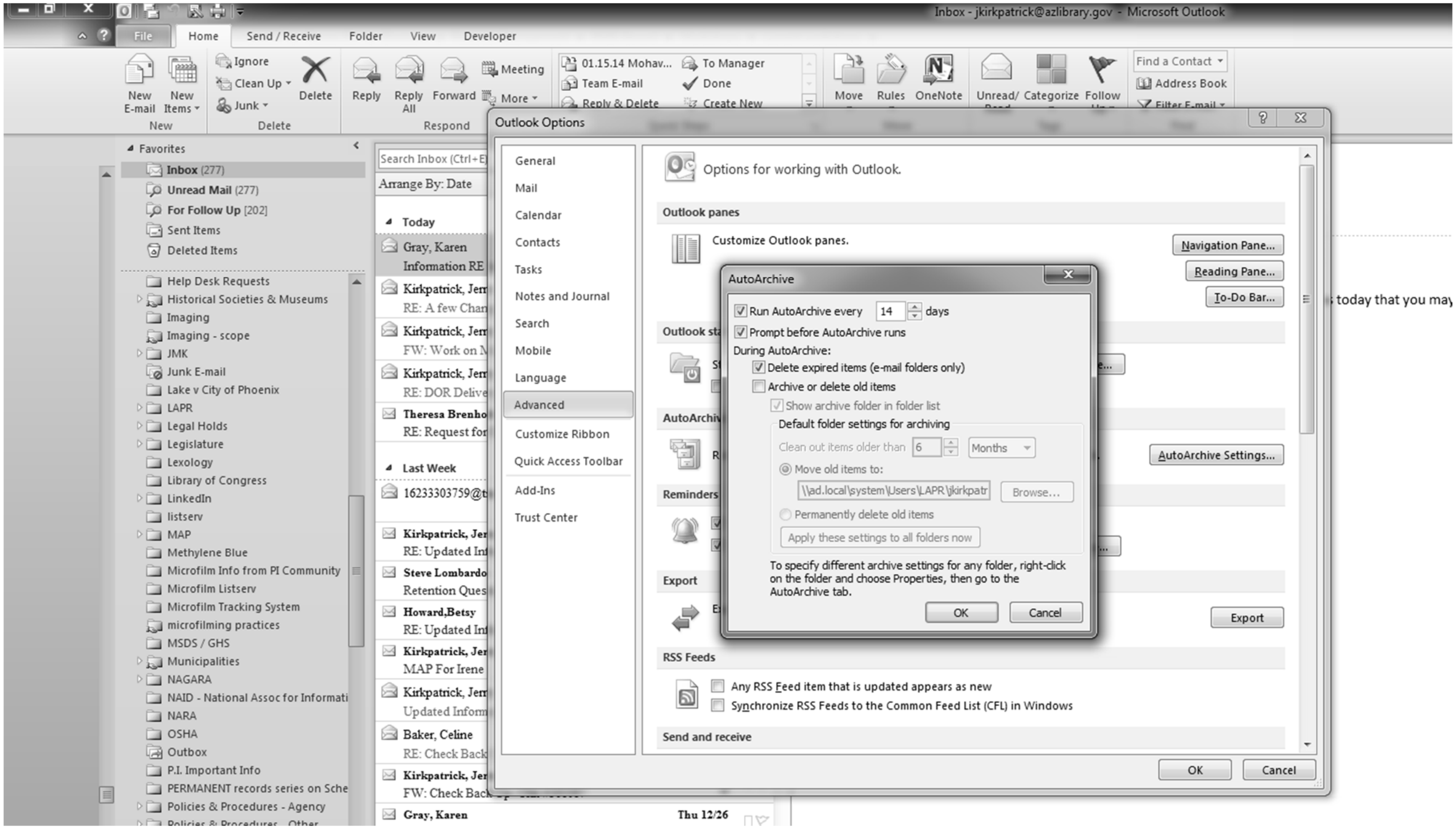
- Who is managing your email records? IT? RM? You?
- Who is responsible for managing your email? IT? RM? You?
- Does my public body need to have a special software / special vendor to help manage our email records?
- Many public bodies in Arizona utilize Microsoft Outlook for their email
- **Outlook 2007** and **2010** have some Records Management (records retention capabilities) built in
- You can set a specific retention period for a specific subfolder(s)
- Your IT may NOT have enabled individual users to set retention.
- Ask IT to help you set up folder retention – which I will demonstrate next.

HOW TO ALLOW AUTO-ARCHIVE FOR YOUR OUTLOOK

How to Set-up Outlook so AutoArchive is allowed:

1. In Outlook, under HOME tab (at top of Outlook screen), click on your “Inbox”
2. Next, click on FILE tab
3. Move down to OPTIONS and click
4. In pop-up box, click on ADVANCED
5. Click on AutoArchive Settings
6. Click to checkmark box for “Run AutoArchive every 14 days” (standard time frame)
7. Click to checkmark box for “Prompt before AutoArchive runs”
8. Under “During AutoArchive”, click to checkmark “Delete expired items (e-mail folders only)
9. Then, click OK button
10. This will allow you to next set up AutoArchive for certain subfolders

SCREEN PRINT OF AUTO-ARCHIVE PROCESS



Inbox - jkirkpatrick@azlibrary.gov - Microsoft Outlook

Outlook Options

Options for working with Outlook.

AutoArchive

☑ Run AutoArchive every 14 days

☑ Prompt before AutoArchive runs

During AutoArchive:

- ☑ Delete expired items (e-mail folders only)
- ☐ Archive or delete old items
  - ☑ Show archive folder in folder list
  - Default folder settings for archiving
    - Clean out items older than 6 Months
    - ● Move old items to: \\ad.local\system\Users\LAPR\jkirkpatr
    - ○ Permanently delete old items

To specify different archive settings for any folder, right-click on the folder and choose Properties, then go to the AutoArchive tab.

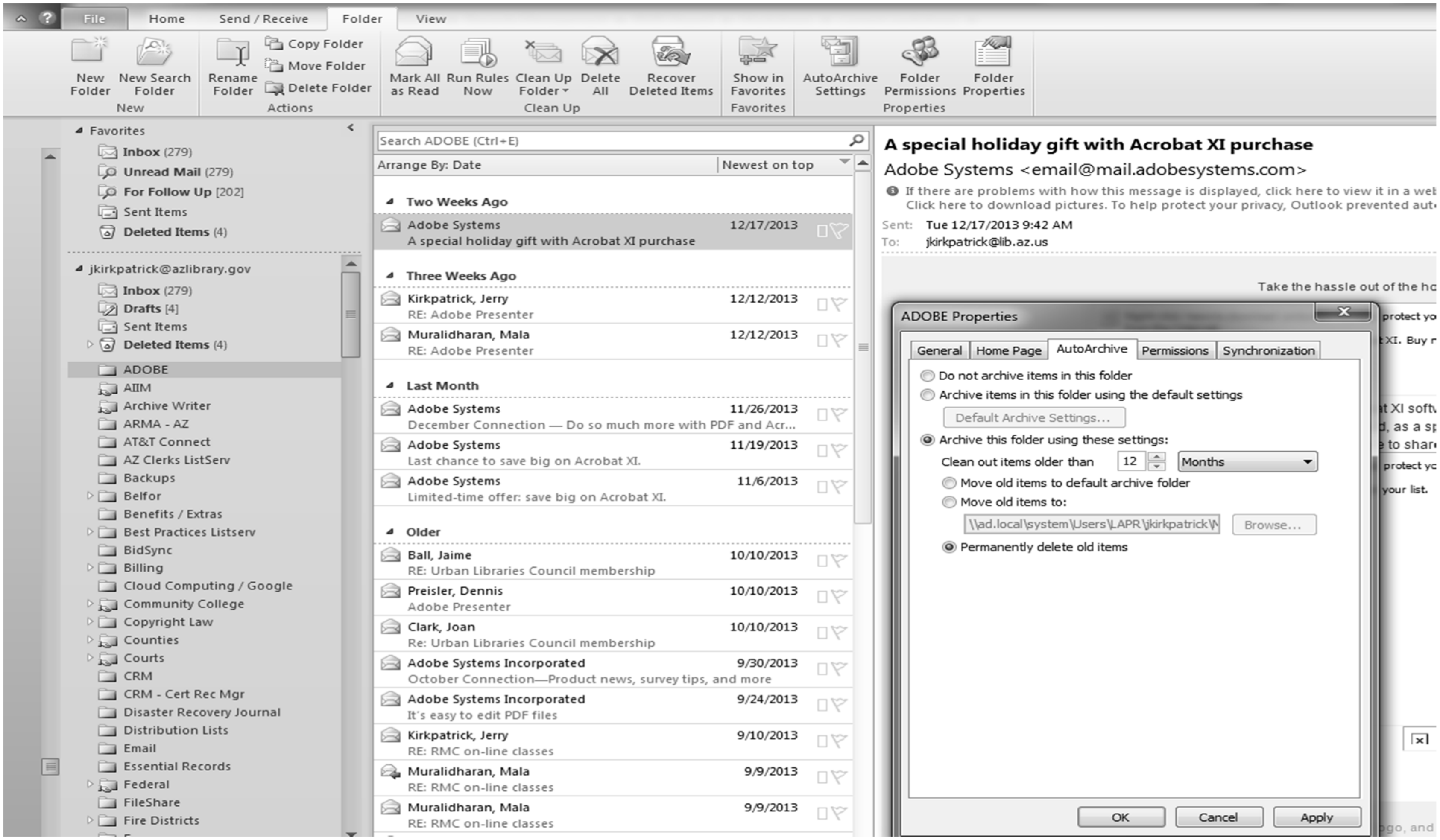
File
Home
Send / Receive
Folder
View
Developer
Favorites
Inbox (277)
Unread Mail (277)
For Follow Up [202]
Sent Items
Deleted Items
General
Mail
Calendar
Contacts
Tasks
Notes and Journal
Search
Mobile
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Outlook panes
Customize Outlook panes.
Navigation Pane...
Reading Pane...
To-Do Bar...
AutoArchive Settings...
Reminders
Export
RSS Feeds
Any RSS Feed item that is updated appears as new
Synchronize RSS Feeds to the Common Feed List (CFL) in Windows
Send and receive
Browse...
Apply these settings to all folders now
OK
Cancel

HOW TO AUTO-ARCHIVE
AT INDIVIDUAL FOLDER LEVEL

How to Set-up Outlook folder(s) so AutoArchive is allowed at folder level:

1. In Outlook, under HOME tab (at top of Outlook screen), click on one of your subfolders
2. Next, click on FOLDER tab
3. Move over to AUTOARCHIVE SETTINGS and click
4. In pop-up box, you should see “Do not archive items in this folder” highlighted
5. (All of your subfolders should have this box highlighted UNTIL you choose to set a specific retention period – activate AutoArchive for that folder)
6. Click “Archive this folder using these settings” to highlight
7. Set an appropriate retention period by choosing a **number** from the drop down and **selecting** either “**months**” “**weeks**” or “**days**”
8. Next, you have two options depending upon whether you want the emails to be automatically deleted when time is up, or placed into a folder for you to review before you delete them.
9. For some email subfolders (like “General Correspondence”) you will probably not need to review each email before they are deleted, so you can click “Permanently delete old item”
10. For some email subfolders (like “Current Contracts”) you will want to review each email to see if they need additional retention, need to be moved to another subfolder (like “Expired Contracts”), etc. In this case, click “move old items to” button
11. When you choose this option, you will need to set up a folder, name it (“Review Emails Before Deleting” or the like), choose the location of the folder, etc.
12. Then, click OK button
13. This will allow you to next set up AutoArchive for certain subfolders

SCREEN PRINT OF FOLDER AUTO-ARCHIVE PROCESS


File
Home
Send / Receive
Folder
View
New Folder
New Search Folder
New
Rename Folder
Copy Folder
Move Folder
Delete Folder
Actions
Mark All as Read
Run Rules Now
Clean Up Folder
Delete All
Recover Deleted Items
Clean Up
Show in Favorites
Favorites
AutoArchive Settings
Folder Permissions
Folder Properties
Properties
Favorites
Inbox (279)
Unread Mail (279)
For Follow Up [202]
Sent Items
Deleted Items (4)
jkirkpatrick@azlibrary.gov
Inbox (279)
Drafts [4]
Sent Items
Deleted Items (4)
ADOBE
AIIM
Archive Writer
ARMA - AZ
AT&T Connect
AZ Clerks ListServ
Backups
Belfor
Benefits / Extras
Best Practices Listserv
BidSync
Billing
Cloud Computing / Google
Community College
Copyright Law
Counties
Courts
CRM
CRM - Cert Rec Mgr
Disaster Recovery Journal
Distribution Lists
Email
Essential Records
Federal
FileShare
Fire Districts
Search ADOBE (Ctrl+E)
Arrange By: Date
Newest on top
OK
Cancel
Apply
Browse...
Default Archive Settings...

Two Weeks Ago

Adobe Systems	A special holiday gift with Acrobat XI purchase	12/17/2013

Three Weeks Ago

Kirkpatrick, Jerry	RE: Adobe Presenter	12/12/2013
Muralidharan, Mala	RE: Adobe Presenter	12/12/2013

Last Month

Adobe Systems	December Connection — Do so much more with PDF and Acr...	11/26/2013
Adobe Systems	Last chance to save big on Acrobat XI.	11/19/2013
Adobe Systems	Limited-time offer: save big on Acrobat XI.	11/6/2013

Older

Ball, Jaime	RE: Urban Libraries Council membership	10/10/2013
Preisler, Dennis	Adobe Presenter	10/10/2013
Clark, Joan	Re: Urban Libraries Council membership	10/10/2013
Adobe Systems Incorporated	October Connection—Product news, survey tips, and more	9/30/2013
Adobe Systems Incorporated	It's easy to edit PDF files	9/24/2013
Kirkpatrick, Jerry	RE: RMC on-line classes	9/10/2013
Muralidharan, Mala	RE: RMC on-line classes	9/9/2013
Muralidharan, Mala	RE: RMC on-line classes	9/9/2013

A special holiday gift with Acrobat XI purchase

Adobe Systems <email@mail.adobesystems.com>

If there are problems with how this message is displayed, click here to view it in a web

Click here to download pictures. To help protect your privacy, Outlook prevented aut

Sent: Tue 12/17/2013 9:42 AM

To: jkirkpatrick@lib.az.us

Take the hassle out of the ho

ADOBE Properties

General | Home Page | AutoArchive | Permissions | Synchronization

○ Do not archive items in this folder

○ Archive items in this folder using the default settings

● Archive this folder using these settings:

Clean out items older than 12 Months

○ Move old items to default archive folder

○ Move old items to: \\ad.local\system\Users\LAPR\jkirkpatrick\

● Permanently delete old items

SUGGESTED SUBFOLDERS

- Here are some subfolders you might want to create:
- 1. General Correspondence (possible retention period – 3 months)
- 2. Time and Leave Records (Retention period – 48 or 60 months)
- 3. Progress Reports (Weekly / Monthly) – possible retention period 12 months
- 4. Budget Work files (FY13) (FY14) (FY15) – possible retention 48 or 60 months
- 5. Current Contracts (possible retention period 36 months and **then review** to see if **contract** is still **active or** has it **expired**)
- 6. Expired Contracts (Retention Period – 72 months)

- Use the General or Custom Retention Schedule for your Division or the record series you create / receive and set up subfolders for each records series you work with.

- Set up subfolders that reflect the types of records you deal with.

OFFICE.MICROSOFT.COM PROVIDES HELP

Automatically move or delete older items with AutoArchive

- http://office.microsoft.com/en-us/outlook-help/automatically-move-or-delete-older-items-with-autoarchive-HA010354967.aspx?CTT=1

AutoArchive settings explained

- http://office.microsoft.com/en-us/outlook-help/autoarchive-settings-explained-HA010362337.aspx?CTT=5&origin=HA010354967

VIDEOS ON HOW TO AUTO-ARCHIVE IN OUTLOOK

Outlook 2010

- *How to Setup and Run Auto Archive Outlook 2010* **by David Ludlow** **http://www.youtube.com/watch?v=JGSHIepyLkI**

- *How to use Outlook 2010 AutoArchive Settings* **by ApexNWTechnology**
- **http://www.youtube.com/watch?v=ip3sVjMhCIA**

Outlook 2007

- *Auto Archive Outlook 2007* **by David Ludlow**
- **http://www.youtube.com/watch?v=WvxBKPSLXPc**

IT Outlook Governance (Usually available only to IT)

- *Email Retention in Outlook 2010: A User's Guide* **by Russell Rockett** **http://www.youtube.com/watch?v=QkKoC1GX-FQ**

***Disclaimer: I am not recommending this video creator, nor their videos, etc.

GOT QUESTIONS?

Any Questions?

Please complete an **Evaluation** – in email with on-line session instruction

HELPFUL CONTACTS

Records Management Center (LAPR):
http://www.azlibrary.gov/records/
Phone: 602-926-3815
records@azlibrary.gov

Karen Gray
kgray@azlibrary.gov
Phone: 602-926-3817

Jerry Lucente-Kirkpatrick:
jkirkpatrick@azlibrary.gov
Phone: 602-926-3820

Dr. Melanie Sturgeon:
msturgeon@azlibrary.gov
Phone: 602-926-3720
Toll Free: 1-800-228-4710 (Arizona only)

State Ombudsman's Office
http://www.azleg.gov/ombudsman/default.asp

State Attorney General – Public Records Publication
https://www.azag.gov/sites/default/files/sites/all/docs/agency-handbook/ch06.pdf

AIIM – Global Community of Information Professionals
http://www.aiim.org/

ARMA International:
http://www.arma.org/

Institute of Certified Records Managers (ICRM):
http://www.icrm.org/

National Archives and Records Management (NARA):
http://www.archives.gov/records-mgmt/

National Association of Government Archivists and Records Administrators (NAGARA):
http://www.nagara.org/index.cfm